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Anniversary Edition
Yearbook 2019

The Quality of the media

Digest: main findings

Switzerland

The Yearbook is available in printed form (ISBN 978-3-7965-4089-9) at Schwabe Publishers (www.schwabeverlag.ch) and appears each autumn. Additionally, a free PDF is made available on www.qualitaet-der-medien.ch in german. The accompanying studies “Qualität der Medien” focus on subjects concerning media quality and are also published as free PDF on www.qualitaet-der-medien.ch.

The main findings are part of the print edition as well as of the PDF available online.

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Main findings 2019

The Quality of the Media – Switzerland

The transformation of the Swiss media public sphere

The Yearbook Quality of the Media – Switzerland celebrates a great anniversary. Already for the tenth time we publish this study. We would never have thought that it would be possible to finance such a large-scale research project and to inspire a team of up to ten researchers over such a long period of time for the research contents pursued, as well as to receive such a broad public response each year. Over the years, the yearbook project has remained faithful to its basic claim of surveying the Swiss media public sphere and making the findings part of the societal discourse. Since the first issue in 2010, we have been analysing the reporting quality of professional information media and their resources, journalistic diversity and media concentration in the Swiss media arena, and last but not least, the changed usage habits of the audience. Nevertheless, much has changed over time in research design and priorities. Certainly, the most important change is that our focus today no longer applies only to professional information media in Switzerland. The digital-driven structural change of the media public sphere has required expanding the research perspective. For a long time, the Swiss media public sphere has no longer been characterized solely by professional, journalistic information media. A variety of new providers have started to form part of it. Civil society, pseudo-journalistic sources and public relations from politics, business and other spheres of action have become more important than journalism for public opinion. They form now part of a newly compiled «media bundle» for many people. In particular, however, the

global tech platforms, above all those of Facebook, Google, YouTube etc., also expose the Swiss media public sphere to substantial change far from complete. This «platformisation» changes the opportunities of access to the public and of the use of media positively and negatively, it changes logics and modes of public communication, and pressurizes professional information journalism which has undergone a measurable erosion process in recent years.

The results of the main study, summarized in these main findings, and the five separately published supplementary studies put this transformation of the Swiss media public sphere at the centre. This summary of the main findings is divided into the four headings «Change of media use» (1), «Change of media economics» (2), «Change of structural and content-based media concentration» (3) and «Change of media content» (4). The conclusion then consists in media policy considerations.

1 Change of media use

1.1 Digital first and «platformisation» of media use

The transformation of the Swiss media public sphere becomes clear when first considering media use. If users are asked which information channels they consume «often» or «very often», the increase in importance of digital sources becomes clear. The largest loss was registered

by (printed) subscription newspapers. Within ten years, their usage share drops from 56% to 32%. Similarly, radio and television are used less often. By contrast, online sources of information increased their usage share from 52% to 61% during the analysed period. Above all, however, there is a progressive «platformisation» of media use. With a share of 70% in 2019, social media are the most widely used news channel in the population. Social media are now an integral part of the «media diet» of the vast majority of the Swiss population, although they figure rarely as the main sources of news.

1.2 Shifts in the «media diet»: News deprivation continues to progress

The significant transformations in media use become even clearer when analysing how the «media diet» of users is composed and how it changes over time. In our research, we examine such media diets in the form of so-called repertoires and can now access a data series going back to the year 2009. The repertoire of the «news deprived», which is characterized by a far below average news consumption, gained massively. From 2009 to 2019, this repertoire has grown the most, by 15 percentage points, representing now 36% of the population and the most common repertoire. If we zoom in on the age group of young adults, i.e. the group of 16 to 29 year old respondents, this news repertoire now includes 56% of the users. While the news deprived generally consume little news, the representatives of the repertoire of «global surfers» are considered to be interested in news. However, due to their media diet, they are insufficiently confronted with local and national reporting. Nevertheless, a supply with domestic news contents is necessary in order to be able to exercise fundamental democratic rights on an informed basis or to participate in the public sphere of the country in which one lives. With the «news deprived» and the «global surfers», the most problematic repertoires from a democratic point of view have thus gained most in recent years.

1.3 Usage motives on social media: entertainment and socializing before information

Social media play an increasingly important role in everyday life, also beyond news. The question is: How important is news consumption compared to other motives like socializing and entertainment? The most common usage pattern is «socializing via Facebook and WhatsApp, news in passing» (63%) followed by «entertainment via Facebook and WhatsApp, news in passing» (39%). In both patterns, respondents only use news incidentally. Among respondents forming part of the repertoire «news deprived», the answer «socializing and entertainment via Instagram and Snapchat, no news» dominates. All in all, our analysis shows that consuming news on social media is a rather subordinate usage motive. Entertainment and socializing (networking and maintaining contacts) are in the foreground. The predominant usage of social media thus promotes news deprivation.

1.4 «Messengerisation» – Growing privatization of the digital public sphere

The analysis of the dominant usage patterns on social media proves the great importance of so-called messenger services like WhatsApp or Facebook Messenger. In fact, the significance of these messenger services has increased sharply both internationally and in Switzerland in recent years (Reuters Institute 2019). WhatsApp is the most widely used social media app in Switzerland today. Around three quarters of the Swiss population (74%) use the app at least once a week. Also, for news consumption, WhatsApp is already used regularly by 26% of the surveyed users in Switzerland.

The strong importance of messenger services can have far-reaching consequences for democratic societies. A functioning democratic society depends on a relevant socio-political discourse being carried out to a sufficient extent in public and not in secret. However, «messengerisation» promotes the privatization of soci-

al debates, which can weaken the basic democratic functions of public communication. First of all, the control function of public communication is weakened because problematic contents remain undetected and therefore cannot be sanctioned with critical reporting. Secondly, the integration function is weakened because isolated messenger communities promote the formation of «echo chambers». Thirdly, the deliberative function is also weakened, because in closed-off messenger communities, it is easier to communicate in an uncivil manner - e.g. promoting defamatory or even racist statements as well as disseminate other problematic content such as disinformation.

1.5 Platformisation promotes emergent, unbundled new consumption

The increasing importance of platforms changes the way news are consumed. They are accessed less and less as a bundled overall offer of individual media brands such as 20minuten.ch, watson.ch or nzz.ch. Although brand-based news consumption still dominates in Switzerland, the importance of unbundled, so-called emergent media consumption is increasing. Already 27% of respondents in Switzerland are «emergent media users». They come across news more or less incidentally on social media (12%), via news aggregators (4%) or by typing keywords in search engines (11%). The problem with emergent news consumption is that loyalty to conventional media brands is decreasing (Kalogeropoulos and Newman 2017) and that people who access news sites directly show a significantly higher willingness to pay for news than users who have an emergent user behaviour (Reuters Institute 2019).

1.6 Private individuals and political PR as important agenda setters on social media

Social media are becoming increasingly important for media consumption. But who is able to determine the discourse in the social media sphere? In a study unique for Switzerland, we examined which topics and which actors dominate the Swiss Twitter sphere. For this purpose, a tracking of all Swiss Twitter users (around 300,000 users) was installed.

Based on our analysis, the transformation in the digital public sphere is exemplified. If so far, lead media have been central gatekeepers of public communication, other actors can now use social media to impose topics and determine the social discourse. The analysis shows that in the Twitter sphere, private individuals are the most able to determine the socio-political agenda, followed by politicians. Journalists only follow in third place. The hierarchy of the most influential agenda setters is thus turned upside down to a certain extent in the social media sphere compared to the classic, mass mediatized public. However, so-called alternative media are of little importance in the Swiss Twitter sphere as they appear only marginally. In the examined Swiss digital public sphere, therefore, disinformation represents less of an urgent problem than PR, which is oriented towards individual interests.

1.7 Disinformation: Not a priority issue

The fact that disinformation is not a central problem in the Swiss digital public sphere is also confirmed on the basis of population surveys. If one asks the Swiss to what extent they encountered problematic content in the previous week, the reported values are significantly lower in comparison to international reference countries. Only 27% of respondents said they had met «reports with intentionally falsified facts», which is 12 percentage points less than respondents from foreign reference countries. Only 13% answered positively to the question of having encountered «fictional reports made up for political or economic purposes» the previous week. This is 13 percentage points less than the values in the 37 foreign reference countries.

1.8 High trust in established information media, low trust in social media

How does platformisation change the confidence of Swiss users in professional information media and in social media? Among the Swiss population, traditional information media enjoy much more trust (47%) than search engines (29%) or social media (17%). With these levels of trust in classic information media, Switzerland is in

the top third of all 38 countries studied, and in midrange if one looks only at the 12 Western reference countries. Distinguishing between age groups reveals interesting differences: The most intense social media users, the youngest respondents, distrust news on social media the most (62%). Overall, we are confronted with the remarkable finding that the increasing use of social media goes hand in hand with little trust in these platforms.

2 Change of media economics

2.1 Low willingness to pay for news remains constant

The willingness to pay for online news remains low in Switzerland and in many other countries. Only 11% of Swiss media users stated in 2019 to pay for digitally available news. The willingness to pay is at a similarly low level in many other countries. One exception is formed by the Scandinavian countries, especially Norway (35%) and Sweden (27%) with significantly higher shares for users' willingness to pay (see Chart I.9). As a reason for the lack of willingness to pay, interviewees mention the free availability of information in the digital network and on platforms (fög 2018).

2.2 Much higher willingness to pay for streaming services

Another reason for the low willingness to pay for online news is competition through streaming services offering entertainment such as Netflix, Amazon Prime or Spotify. If users had to choose between a subscription to a news offer and to an entertainment-oriented offer, the choice would generally fall on the entertainment offer. Among the respondents between 18 and 24 years old, just 4% would choose the news subscription, while 83% would prefer entertainment. The older the respondents, the more likely they are to choose the news offer.

2.3 Platformisation pressurizes information-based journalism

Information-based journalism is being weakened by the outflow of advertising money to the tech platforms. For 2017, the entire online advertising market, including search engine advertising, was estimated at 2.1 billion Swiss francs (see Stiftung Werbestatistik 2018). Google alone takes a share of 1.4 billion francs, i.e. around 67%. This is significantly more than all Swiss news providers receive together in advertising money. Not included in this amount are revenues of other tech giants. It is likely that besides Google also Facebook and YouTube will generate substantial revenues and expand their dominance in the next few years. A survey of Swiss media experts revealed that 2.3 billion Swiss francs are expected to be invested in online advertising by 2019. According to the estimates, 1.6 billion Swiss francs will flow abroad, especially to Google and Facebook (Handelszeitung.ch, 20.2.2019).

3 Change of the structural and content-based media concentration

3.1 Increase in structural media concentration

Platformisation weakens the professional information journalism from a perspective of media economics. One consequence is the significant increase in media concentration in Switzerland in recent years. The market shares of large media companies are growing, the number of different media owners (controlling parties) is falling, and the number of titles is decreasing. In the press market of German-speaking Switzerland, media concentration - measured by the reach of the three largest controlling parties - increased by 27 percentage points to 83% in the period from 2001 to 2018. In the online market it increased by 11 percentage points to 71% in the period from 2010

to 2018. Media concentration is particularly pronounced in French-speaking Switzerland. In the press market, it has grown by 10 percentage points to 89% since 2001, and in the online market by 6 percentage points to 87% since 2010. The market entry of some media start-ups such as Republik, Bon pour la tête, Sept, Micro or Heidi.news represent a positive development. Although they are widely discussed in public, they are still used relatively little by the general audience.

3.2 Increase in content-based media concentration

Not only the structural media concentration increases as a result of scarcity in media markets, but also the content-based concentration, measured by the proportion of independent media contributions (unique articles). This is shown by an automated text comparison for the journalistic output in the German-speaking media arena for the years 2017 and 2018. Overall, the share of unique articles in editorial reporting in the German-speaking media arena declined by 7 percentage points in 2018 compared to the previous year and reaches now 74%. Drivers of this development are editorial cooperation systems. The increase in structural and content-based concentration reduces the diversity of topics and opinions and weakens the intermedia watchdog function. The likelihood that journalistic errors will be uncovered and punished with critical reporting will decrease if more and more media titles belong to the same journalistic network system and more and more of the same contributions are circulated in different media titles.

4 Change of media content

4.1 Media quality – high levels of professionalism, decreasing diversity and provision of context

How does the quality of the media change against the background of the described restructuring of the Swiss media public sphere? This question was examined for this year-

book on the basis of a comprehensive analysis of the available long-term data series including a total of 64 Swiss titles for the period between 2015 and 2018. Viewed overall, despite the ongoing structural media crisis, the examined offers only lose a slight but significant amount of quality. But not all quality dimensions are equally affected. Professional journalistic standards such as a factual and balanced reporting style, the amount of genuine editorial contributions and the transparency of sources remain stable over the years. This is an important finding, because a high level of professionalism in information journalism creates trust among the public. In return, however, the journalistic media titles examined lost quality in the dimensions «relevance» and especially «diversity». Soft news are gaining in importance and the diversity of reporting is decreasing significantly. Also, the dimension «provision of context» shows losses. Above all, explanatory policy reporting providing background information has decreased significantly over the years.

4.2 Lead media status – very few media are quoted very often

In addition to the media quality measured in terms of content, this yearbook also identified the status of lead media of 48 far-reaching information media in Switzerland, based on their citation frequency in the Swiss media arena. The results show that a few media are quoted very often, but most are little or not at all. Media with headquarters in or main focus on Zurich dominate: The most citations are attributed to SRF and Blick, followed by NZZ, Tages-Anzeiger, SonntagsZeitung, NZZ am Sonntag and Sonntagsblick. The large (Zurich) subscription titles and Sunday newspapers are frequently cited, especially in political and economic reporting, while SRG SSR titles are referenced in political but also in cultural and human interest reporting. The tabloid titles Blick und Sonntagsblick achieve lead media status in sports coverage.

4.3 Media-facilitated integration – sports most important when looking beyond the linguistic borders

To what extent does media-facilitated integration still work against the background of the described transformations in multilingual Switzerland? Media-facilitated integration is measured by the extent to which the Swiss media observe the other parts of the country or make them a topic. Overall, the external and internal perspectives differ greatly in the three language regions studied. German-speaking Switzerland reports mainly about itself, namely in 81% of the cases. By contrast, the media of French- and Italian-speaking Switzerland are less self-referential and report less, namely in 63% or 49% of the cases respectively, about their own linguistic region. When looking at the other language region, sports reporting has the strongest integrative impact. Tabloid media such as *Sonntagsblick* and the portals of the SRG SSR report more often than average about the other language regions. Tabloid newspapers have an integrative effect based their sports coverage, while SRG SSR contributes to the integration beyond language borders based on political reporting.

5 Conclusion – More media patriotism needed

In the ten years of our yearbook research, we have been able to build up a comprehensive data set documenting the transformation of the Swiss media public sphere. What was not yet apparent at the start ten years ago has become the red thread through our research results over the years: The most important driver for the transformation is platformisation. The rapidly growing importance of the platforms of the global tech giants (Facebook, Google, Youtube etc.) is reflected in various indicators that have been detailed in these key findings. As a consequence, the platformisation weakens the professional Swiss information journalism, a fact that is exemplified via, among other things, the

progress of media concentration in Switzerland. Professional information media and editorially produced news remain indispensable for a democratic society. Social platforms cannot produce the fuel necessary for democratic societies on their own. The drilling of thick boards in the form of socially relevant content requires professional journalists who are equipped with the necessary skills and resources and who are guided by professional and quality standards.

What is hence needed is a new media patriotism. It must be guided by the understanding that local journalistic information-based media are indispensable to a democratic nation-state such as Switzerland, but that they are primarily pressurized from the outside, i.e. by the global tech platforms. It must also recognize the fact that journalism needs to be assisted in the face of the growing market failure. The support of a national system of professional information media must include both state-based and further-reaching measures. In the area of government action, proposals for taxing advertising revenues generated through journalistic content through tech platforms were already made in the last yearbook *Quality of the Media*. Likewise, the suggestion was made to further develop direct media promotion and to tackle the necessary constitutional change in order to enable a genre-independent journalism promotion. The fact that direct media promotion is possible without endangering journalistic independence is underlined by the many years of experience with the direct subsidy of private broadcasting in Switzerland, but also by the experience in various Scandinavian countries which act much more courageously concerning direct media promotion.

In the non-governmental area, however, a new media patriotism would in particular require the intensification of cooperation between media organizations in Switzerland. The self-healing powers against the influence of the tech platforms can only be strengthened working with and not against each other. This vision relies on a Swiss digital common for professional infor-

mation journalism, which includes cooperation wherever it would not diminish journalistic competition as a prerequisite for an enlightened, multifaceted discourse. This is asking for cooperation in the infrastructure sector but competition in content-based journalism. The envisaged high-quality digital infrastructure for journalism should also allow small journalistic media providers to connect with the digital media world, as they do not have the resources or the know-how to invest in such infrastructures themselves. This digital infrastructure would have to be independent from the state and organized with independent sponsorship. It could be supported by a foundation that is funded by the financial resources of a wide array of actors, including civil society and the private sector. It would have to serve the publication and discussion of journalistic content, but also enable intelligent search functions and interactions with users. An infrastructure that has learned from the tech giants, yet builds on democratic ideals of diversity, civilized discourse, the quality and appropriateness of the content and the protection of privacy. Algorithms that determine what the user receives on the screen would be transparent and freely calibratable by the users.

Of course, such a media patriotism should not isolate itself. It must recognize the national importance of professional information media for a still domestically anchored democracy. At the same time, it has also to be open for transnational cooperation - e.g. in the area of data protection, the cooperation of public broadcasters beyond national borders or the development of such a common itself. Why should not Switzerland, democracy and media country, make headway in the development of such an intelligent digital environment?

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Sources and methods

The analyses underlying the Yearbook are based on both data gathered specifically for those purposes and also secondary data. The various sources are listed here, along with the various methodologies used:

Content analysis

The quality of reporting is measured using a content analysis conducted at the fög – Research Institute for the Public Sphere and Society / University of Zurich. A quality scoring system was implemented on the basis of this, with each story being coded by trained coders in accordance with scientific conventions (there is no automation of quality assessment). The random sample from 2018 takes 23,961 stories from 64 Swiss media into account.

Public surveys

First, again this year, the data from the “Reuters Digital News Report” was considered. This global report contains representative survey data concerning online user behaviour of the population of 38 countries (over 74,000 interviews), including Switzerland. The fög – Research Institute for the Public Sphere and Society / the University of Zurich is the Swiss partner organisation for this major study conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. Some

2,000 Internet users were surveyed from the German-speaking and French-speaking regions of Switzerland. Random samples representative of Internet users aged 18 and over were taken on the basis of online panels (cf. chapter “Methodik”). Second, survey data from the representative yearly media usage survey implemented by fög in collaboration with GfK Switzerland was included into the analyses. In this survey, 3400 online interviews were executed since 2009 each beginning of the year (cf. chapter “Methodik” as well as chapter II).

Characteristics of the media sector

The studies to ascertain the spread and concentration of information media and the media market are based on circulation figures or reach as measured by the media research organisations WEMF, NET-Matrix and Mediapulse. The data regarding funding of the media comes from the Stiftung Werbestatistik Schweiz.

What is the purpose of the Yearbook?

Since it first appeared in 2010, the aim of the Yearbook has been to deepen the discussion regarding the quality of the media and to promote the awareness for the performance of information journalism for society. The Yearbook will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media content. The Yearbook is based on the long-held view that the quality of democracy depends on the quality of the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

Our quality concept

This Yearbook is underpinned by a normative concept of quality, which takes it as read that information media do an important job for soci-

ety as part of a properly functioning democracy. From the functions performed by public communication, it is possible to derive four quality dimensions, which are widely embedded in both academic research and journalistic practice. Firstly, the “relevance” dimension is intended to say something about the ratio of hard news to soft news, and also the weight given to stories regarding matters at an institutional level compared with reporting focused on individual people. The “diversity” quality dimension measures whether events are being reported from many different points of view in terms of both content and geography. “Provision of context” is high where current events are framed in relation to longer-term developments and topical implications. Lastly, the “professionalism” quality dimension includes whether reporting is primarily factual (instead of emotional) and whether it is generated by editorial staff themselves, as well as the level of source transparency.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – Research Institute for the Public Sphere and Society / University of Zurich (www.foeg.uzh.ch). Eight academics and three students are involved in the research and vouch for the quality of the analyses.

Who provides funding and support for the Yearbook?

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Where can I find the Yearbook and the studies?

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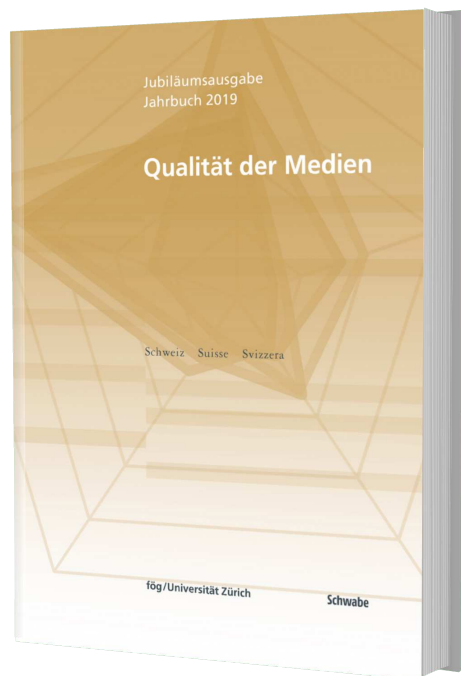
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